

MAR 22 2004 17:06 FR IBM AUSTIN

5128383060 6783860 TO 93016742

P.02

## PATENT

## IN THE UNITED STATES PATENT AND TRADEMARK OFFICE

In re application of:  
Rodriguez, et. al.

Serial No.: 09/704,569

Filed: November 3, 2000

Title: System and Method for Automating  
Travel Arrangement Operations

§ Group Art Unit: 3623  
§  
§ Examiner: Robinson Boyce, Akiba K  
§  
§ Attorney Docket No. AUS920000488US1  
§ Intellectual Property Law Department  
§ International Business  
§ Machines Corporation  
§ Intellectual Property Law Dept.  
§ 11400 Burnet Road  
§ Austin, Texas 78758

DECLARATION UNDER 37 C.F.R. § 1.131

Hon. Commissioner of Patents and Trademarks  
Washington, D.C. 20231

Sir:

Newton James Smith declares as follows:

1. I am an Applicant for the patent application entitled "System and Method for Automating Travel Arrangement Operations," Serial No. 09/704,569, filed November 3, 2000, and an inventor of the subject matter described and claimed therein.
2. Prior to September 27, 2000, I completed and reduced to practice, in the United States of America, the invention described and claimed in the subject application, as evidenced by the following:
  - a) I submitted IBM Invention Disclosure Form Nos. AUS8-2000-0188, AUS8-2000-0189, AUS8-2000-0225, AUS8-2000-0226 AUS8-2000-0250, and AUS8-2000-0251 attached collectively as "Exhibit A" hereto, which describes the invention described and claimed in the subject application.

Docket No. AUS920000488US1

Page 1 of 2  
Rodriguez, et. al. - 09/704,569

Atty Ref. No. IBM-0031

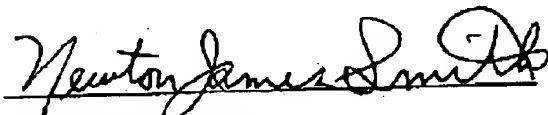
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## PATENT

3. Each of the dates deleted from Exhibit A is prior to September 27, 2000.
4. I further declare that all statements made herein of my own knowledge and all statements made on information and belief are believed to be true; and further that these statements are made with the knowledge that willful and false statements and the like so made are punishable by fine or imprisonment or both under § 1001 of Title 18 of United States Code and that such willful and false statements may jeopardize the validity of the above-referenced application and any patent issuing therefrom.


FURTHER DECLARANT SAYETH NOT.



Newton James Smith

Date: 3/22/2004

# Exhibit “A”

	<b>Disclosure AUS8-2000-0188</b>
	Created By: Herman Rodriguez Created On: [REDACTED] 04:48:57 PM
	Last Modified By: Herman Rodriguez Last Modified On: [REDACTED] 05:49:09 PM
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Required fields are marked with the asterisk (\*) and must be filled in to complete the form.

### Summary

Status	Submitted
Processing Location	AUS
Functional Area	67 - NCS - OPERATING SYSTEMS DEV (L. Santivenere)
Attorney/Patent Professional	David Mims/Austin/IBM
IDT Team	Chrystal Windham/Austin/Contr/IBM
Submitted Date	[REDACTED] 05:48:09 PM
Owning Division	NCS
PVT Score	To calculate a PVT score, use the 'Calculate PVT' button.
Incentive Program	
Lab	
Technology Code	

### Inventors with Lotus Notes IDs

Inventors: James Smith/Austin/IBM, Clifford Spinac/Austin/IBM, Herman Rodriguez/Austin/IBM

Inventor Name > denotes primary contact	Inventor Serial	Div/Dept	Manager Serial	Manager Name
* Smith, N.J. (James)	184864	7J/2BGA	280478	Stephen Yvonne P.
Spinac, C.J. (Clifford)	583082	81/WX/HW	524083	Robert J. (Hans)
Rodriguez, H. (Herman)	378888	7T/20AA	038320	St. Pierre, Ron

### Inventors without Lotus Notes IDs

### IDT Selection

IDT Team:	Attorney/Patent Professional
Chrystal Windham/Austin/Contr/IBM	David Mims/Austin/IBM

### Main Idea

#### \*Title of disclosure (in English)

Travel agent system to automatically handle home mail and package delivery instructions.

#### \*Idea of disclosure

1. Describe your invention, stating the problem solved (if appropriate), and indicating the advantages of using the invention.

After a user calls a travel agent to make travel arrangements, the user must take several steps in order hold or forward his mail. When it comes to package deliveries while the user is away, often the package is returned because the user is unavailable to accept the package, after several delivery attempts.

This invention solves these problems by creating a method by which the above steps are automated, and are initiated as a result of the user making his travel arrangements.

The instructions for holding or forwarding the user's mail, or proper handling of package deliveries are created by the travel agent, based on the user's profile and travel itinerary.

The traveler does not need to manually create and revise mail or package delivery instructions.

2. How does the invention solve the problem or achieve an advantage, (a description of "the invention", including figures inline as appropriate)?

The method created by this invention is as follows:

1. The user's profile at the travel agent will now include a preference option to automatically generate and send mail handling instructions to the Post Office or the package delivery companies to which the user subscribes or anticipates to use.
2. When the travel agent makes travel arrangements on behalf of the user, the Mail and Package delivery instructions entries are automatically transmitted to the Post Office, and to the package delivery companies to which the user subscribes or anticipates to use.
3. A confirmation is sent to the traveler, as a part of the travel package.
4. If travel plans change, the travel agent sends updated Mail and Package delivery instructions to reflect the change.
5. Mail delivery instructions can specify the delivery date, and whether the Post Office is to deliver the accumulated mail, or to hold it for pick-up.
6. Package delivery instructions can specify the delivery date, or options such as alternate delivery address or hold for pick-up.
7. Upon return, the Post Office or the package delivery company follows the user's delivery instructions.

3. If the same advantage or problem has been identified by others (inside/outside IBM), how have those others solved it and does your solution differ and why is it better?  
The user must manually specify delivery instructions.

4. If the invention is implemented in a product or prototype, include technical details, purpose, disclosure details to others and the date of that implementation.  
N/A

**\*Critical Questions ( Questions 1 - 7 must be answered)**

**\*Question 1**  
On what date was the invention workable?  Please format the date as MM/DD/YYYY  
(Workable means i.e. when you know that your design will solve the problem)

<b>*Question 2</b> Is there any planned or actual publication or disclosure of your invention to anyone outside IBM?	<input type="radio"/> Yes <input checked="" type="radio"/> No
If yes, Enter the name of each publication or patent and the date published below	
Publication/Patent:	
Date Published or Issued:	
Are you aware of any publications, products or patents that relate to this invention?	<input type="radio"/> Yes <input checked="" type="radio"/> No
If yes, Enter the name of each publication or patent and the date published below	
Publication/Patent:	
Date Published or Issued:	

**\*Question 3**  
Has the subject matter of the invention or a product incorporating the invention been sold, used internally in manufacturing, announced for sale, or included in a proposal?  
Is a sale, use in manufacturing, product announcement, or proposal planned?  
If Yes, identify the product if known and indicate the date or planned date of sale, announcements, or proposal and to whom the sale, announcement or proposal has been or will be made.  
Product:  
Version/Release:  
Code Name:  
Date:  
To Whom:  
If more than one, use cut and paste and append as necessary in the field provided.

☒ No  
☐ Yes  
☒ No

**\*Question 4**  
Was the subject matter of your invention or a product incorporating your invention used in public, e.g., outside IBM or in the presence of non-IBMers?  
If yes, give a date. Please format the date as MM/DD/YYYY

☐ Yes  
☒ No

**\*Question 5**  
Have you ever discussed your invention with others not employed at IBM?  
If yes, identify individuals and date discussed. Fill the text area with the following information: the names of the individuals, the employer, date discussed, under CDA, and CDA #.

☐ Yes  
☒ No

**\*Question 6**  
Was the invention, in any way, started or developed under a government contract or project?  
If Yes, enter the contract number.

☐ Yes  
☒ No  
☐ Not sure

**\*Question 7**  
Was the invention made in the course of any alliance, joint development or other contract activities?  
If Yes, enter the following: Name of Alliance, Contractor or Joint Developer  
Contract ID number  
Relationship contact name  
Relationship contact E-mail  
Relationship contact phone

☐ Yes  
☒ No  
☐ Not Sure

**Question 8**  
Have you submitted, or are you aware of, any related disclosure submission?  
If Yes, please provide the title and docket or disclosure number below.

☐ Yes  
☒ No

Travel agent system to automatically handle home mail and package delivery instructions. - cont'd

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**Question 9**

What type of companies do you expect to compete with inventions of this type? Check all that apply.

- ☐ Manufacturers of enterprise servers
- ☐ Manufacturers of entry servers
- ☐ Manufacturers of workstations
- ☐ Manufacturers of PCs
- ☐ Non-computer manufacturers
- ☐ Developers of operating systems
- ☐ Developers of networking software
- ☐ Developers of application software
- ☐ Integrated solution providers
- ☒ Service providers
- ☒ Other (Please specify below)

Travel Agents

**Patent Value Tool (Optional - this may be used by the inventor and attorney to assist with the evaluation of your invention.)**

(The Patent Value tool can be used by you or the evaluation team to determine the potential licensing value of your invention.)

The Patent Value Tool has not yet been used to calculate a score.

**Post Disclosure Text & Drawings**

Enter any additional information relating to this disclosure below:

(Form Revised [redacted])

Printed [redacted] at 11:54:58 AM



## Disclosure AUS8-2000-0189

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### Summary

Status	Submitted
Processing Location	AUS
Functional Area	67 - NCS - OPERATING SYSTEMS DEV (L. Santivanera)
Attorney/Patent Professional	David Mims/Austin/IBM
IDT Team	Chrystal Windham/Austin/Contr/IBM
Submitted Date	[REDACTED] 04:33:53 PM
Owning Division	NCS
PYT Score	To calculate a PVT score, use the 'Calculate PVT' button.
Incentive Program	
Lab	
Technology Code	

### Inventors with Lotus Notes IDs

Inventors: James Smith/Austin/IBM, Clifford Spinac/Austin/IBM, Herman Rodriguez/Austin/IBM

Inventor Name > denotes primary contact	Inventor Serial	Div/Dept	Manager Serial	Manager Name
Smith, N.J. (James)	384884	67/25A	280476	Robert L. Hughes
Spinac, C.D. (Clifford)	588042	67/25A	524003	Robert L. Hughes
Rodriguez, H. (Herman)	572682	67/25A	098320	St. Helena, Ron

### Inventors without Lotus Notes IDs

### IDT Selection

IDT Team:	Attorney/Patent Professional:
Chrystal Windham/Austin/Contr/IBM	David Mims/Austin/IBM

### Main Idea

#### \*Title of disclosure (in English)

Travel agent system to automatically update traveler's calendar

#### \*Ideas of disclosure

1. Describe your invention, stating the problem solved (if appropriate), and indicating the advantages of using the invention.

After a user calls a travel agent to make travel arrangements, the user must manually enter the travel itinerary into the user's electronic calendar, which resides on his desktop computer, organizer, hand-held computer, mobile phone, etc. Not only is this a tedious task, but often the user simply does not update the calendar, causing undue problems to those who depend on the user's valid calendar status.

This invention solves that problem by creating a method to automatically generate calendar entries



Travel agent system to automatically update traveler's calendar - continued

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(hereby called vCalendar entries), that are sent by the travel agency to the user's e-mail. When the user accepts the email that contains the vCalendar entries, the user's calendar is automatically updated to reflect the travel itinerary. The traveler does not need to manually create and revise the calendar since this is now an automatic procedure.

2. How does the invention solve the problem or achieve an advantage, (a description of "the invention", including figures inline as appropriate)?

The method created by this invention is as follows:

1. The user's profile at the travel agent will now include a preference option to automatically generate and send calendar entries (vCalendar) to the user's e-mail address
2. When the travel agent makes travel arrangements on behalf of the user, the vCalendar entries are automatically transmitted to the user via e-mail
3. When the user receives e-mail that contains a set of vCalendar entries (either as a mime-type or as an attachment), the user's mail program (enhanced e-mail program or a plug-in) prompts the user to accept or reject some or all of the vCalendar entries.
4. The user's e-mail program has an option to automatically accept and process a set of vCalendar entries for a predefined list of travel agents.
5. When the user accepts a vCalendar entry set, the user's electronic calendar is automatically updated to reflect the travel itinerary.
6. If the user rejects the vCalendar entry set, the user's calendar is not updated, and the vCalendar entries are discarded.
7. The vCalendar entries can be used to insert new calendar entries, or to update the user's calendar as in the case of a revised travel plan.
8. The vCalendar entries can be sent to an assigned delegate, such as the traveler's secretary, and when the delegate accepts the entries, the vCalendar updates the traveler's calendar.

3. If the same advantage or problem has been identified by others (inside/outside IBM), how have those others solved it and does your solution differ and why is it better?  
Not previously solved. Some system post the user's travel plan on the web, but do not update the user's calendar.

4. If the invention is implemented in a product or prototype, include technical details, purpose, disclosure details to others and the date of that implementation.  
N/A

**\*Critical Questions ( Questions 1 - 7 must be answered)**

<b>Question 1</b> On what date was the invention workable? <input type="text"/> Please format the date as MM/DD/YYYY. (Workable means: i.e. when you know that your design will solve the problem)	
<b>Question 2</b> Is there any planned or actual publication or disclosure of your invention to anyone outside IBM?	<input type="radio"/> Yes <input checked="" type="radio"/> No
If yes, Enter the name of each publication or patent and the date published below: Publication/Patent: Date Published/Granted:	
Are you aware of any publications, products or patents that relate to this invention?	<input type="radio"/> Yes <input checked="" type="radio"/> No

If yes, Enter the name of each publication or patent and the date published below.

Publication/Patent
Date Published or Issued

**\*Question 3**

Has the subject matter of the invention or a product incorporating the invention been sold, used internally in manufacturing, announced for sale, or included in a proposal?

Is a sale, use in manufacturing, product announcement, or proposal planned?

If Yes, identify the product if known and indicate the date or planned date of sale, announcement, or proposal and to whom the sale, announcement, or proposal has been or will be made.

Product:  
Version/Release:  
Code Name:  
Date:  
To Whom:

If more than one, use cut and paste and append as necessary in the field provided.

**\*Question 4**

Was the subject matter of your invention or a product incorporating your invention used in public, e.g., outside IBM or in the presence of non-IBMers?

If yes, give a date. Please format the date as MM/DD/YYYY.

**\*Question 5**

Have you ever discussed your invention with others not employed at IBM?

If yes, identify individuals and date discussed. Fill in the text area with the following information: the names of the individuals, the employer, date discussed, under CDA, and CDA #.

**\*Question 6**

Was the invention, in any way, started or developed under a government contract or project?

If Yes, enter the contract number.

**\*Question 7**

Was the invention made in the course of any alliance, joint development or other contract activities?

If Yes, enter the following: Name of Alliance, Contractor, or Joint Developer

Contract number

Relationship contact name

Relationship contact E-mail

Relationship contact phone

**Question 8**

Have you submitted, or are you aware of, any related disclosure submission?

If Yes, please provide the title and docket or disclosure number below.

Travel agent system to automatically update traveler's calendar - continued

31

**Question 8**  
What type of companies do you expect to compete with inventions of this type? *Check all that apply.*

<input type="checkbox"/>	Manufacturers of electronic devices
<input type="checkbox"/>	Manufacturers of software
<input type="checkbox"/>	Manufacturers of hardware
<input type="checkbox"/>	Manufacturers of PCs
<input type="checkbox"/>	Non-computer manufacturers
<input type="checkbox"/>	Developers of operating systems
<input type="checkbox"/>	Developers of networking software
<input type="checkbox"/>	Developers of application software
<input checked="" type="checkbox"/>	Integrated solution providers
<input checked="" type="checkbox"/>	Service providers
<input checked="" type="checkbox"/>	Other (Please specify below)

Travel Agents, electronic calendar providers

**Patent Value Tool (Optional - this may be used by the inventor and attorney to assist with the evaluation)**

(The Patent Value tool can be used by you or the evaluation team to determine the potential licensing value of your invention.)


The Patent Value Tool has not yet been used to calculate a score.

**Post Disclosure Text & Drawings**

Enter any additional information relating to this disclosure below:

(Form Revised)

- 31

	<b>Disclosure AUS8-2000-0225</b>
	Created By: James Smith    Created On: [REDACTED] Last Modified By: Herman Rodriguez    Last Modified On: [REDACTED]
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**Summary**

Status	Under Evaluation
Processing Location	AUS
Functional Area	87 - NCS - OPERATING SYSTEMS DEV (L. Santivenere)
Attorney/Patent Professional	David Mims/Austin/IBM
IDT Team	Chrystal Windham/Austin/Contr/IBM
Submitted Date	[REDACTED]
Owning Division	NCS
PVT Score	To calculate a PVT score, use the 'Calculate PVT' button.
Incentive Program	
Lab	
Technology Code	

**Inventors with Lotus Notes IDs**

Inventors: James Smith/Austin/IBM, Herman Rodriguez/Austin/IBM, Clifford Spinac/Austin/IBM

Inventor Name > denotes primary contact	Inventor Serial	Div/Dept	Manager Serial	Manager Name
> Smith, N.J. (James)	184864	7J2BCA	280476	Stoetzel, Yvonne P.
Rodriguez, H. (Herman)	378888	7T20AA	038320	St. Pierre, Ron.
Spinac, C.J. (Clifford)	583042	7NAXHA	524003	Roberts, I.H. (Irene)

**Inventors without Lotus Notes IDs****IDT Selection**

IDT Team:	Attorney/Patent Professional:
Chrystal Windham/Austin/Contr/IBM	David Mims/Austin/IBM

Response Due to IP&amp;L : [REDACTED]

**Main Idea****\*Title of disclosure (in English)**

Travel agent system to automatically handle company mail and package delivery instructions.

**\*Idea of disclosure**

1. Describe your invention, stating the problem solved (if appropriate), and indicating the advantages of using the invention.

After a user calls a travel agent to make travel arrangements, the user must take several steps in order to hold or forward his company mail. If a package arrives while the user is away, often the package is returned to the mailroom or left with a neighbor because the user is unavailable to accept the package.

Travel agent system to automatically handle company mail and package delivery instructions. - continued

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This invention solves these problems by creating a method by which the above steps are automated, and are initiated as a result of the user making his travel arrangements.

The instructions for holding or forwarding the user's company mail, or proper handling of company package deliveries are created by the travel agent, based on the user's profile and travel itinerary. Thus, the traveler does not need to manually create and revise company mail or package delivery instructions.

2. How does the invention solve the problem or achieve an advantage, (a description of "the invention", including figures inline as appropriate)?

The method created by this invention is as follows;

1. The user's profile at the travel agent will now include a preference option to automatically generate and send mail and package handling instructions to the user's company mailroom.
2. When the travel agent makes travel arrangements on behalf of the user, the Mail and Package delivery instructions are automatically transmitted to the user as part of the electronic Travel Package, and after optional confirmation by the user, to the company mailroom.
3. If travel plans change, the travel agent sends updated company Mail and Package delivery instructions to the user, and after optional confirmation, to the company mailroom.
4. Mail and package delivery instructions can specify that the mailroom is to hold all mail for pickup or to deliver the mail on a certain date, as well as other options, such as an alternate recipient or delivery address.
5. On the return date in the electronic travel plan, the company mail room follows the user's delivery instructions for mail received while he was away.
6. After the return date in the electronic travel plan, the company mail room resumes normal deliveries.

3. If the same advantage or problem has been identified by others (inside/outside IBM), how have those others solved it and does your solution differ and why is it better?

The user must manually specify delivery instructions.

4. If the invention is implemented in a product or prototype, include technical details, purpose, disclosure details to others and the date of that implementation.

N/A

**\*Critical Questions ( Questions 1 - 7 must be answered)**

<b>*Question 1</b> On what date was the invention workable? <input type="text"/> Please format the date as MM/DD/YYYY (Workable means i.e. when you know that your design will solve the problem)	
<b>*Question 2</b> Is there any planned or actual publication or disclosure of your invention to anyone outside IBM?	<input type="radio"/> Yes <input checked="" type="radio"/> No
If yes, Enter the name of each publication or patent and the date published below. Publication/Patent: Date Published or Issued:	
Are you aware of any publications, products or patents that relate to this invention?	<input type="radio"/> Yes <input checked="" type="radio"/> No
If yes, Enter the name of each publication or patent and the date published below. Publication/Patent: Date Published or Issued:	
<b>*Question 3</b> Has the subject matter of the invention or a product incorporating the invention been sold, used internally in manufacturing, announced for sale, or included in a proposal?	<input type="radio"/> Yes <input checked="" type="radio"/> No

Travel agent system to automatically handle company mail and package delivery instructions. - continued

31

Is a sale, use in manufacturing, product announcement, or proposal planned?	<input type="radio"/> Yes <input checked="" type="radio"/> No
If Yes, identify the product if known and indicate the date or planned date of sale, announcements, or proposal and to whom the sale, announcement or proposal has been or will be made. Product: Version/Release: Code Name: Date: To Whom: If more than one, use cut and paste and append as necessary in the field provided.	
*Question 4 Was the subject matter of your invention or a product incorporating your invention used in public, e.g., outside IBM or in the presence of non-IBMers? If yes, give a date. Please format the date as MM/DD/YYYY	<input type="radio"/> Yes <input checked="" type="radio"/> No
*Question 5 Have you ever discussed your invention with others not employed at IBM? If yes, identify individuals and date discussed. Fill in the text area with the following information, the names of the individuals, the employer, date discussed, under CDA, and CDA #.	<input type="radio"/> Yes <input checked="" type="radio"/> No
*Question 6 Was the invention, in any way, started or developed under a government contract or project? If Yes, enter the contract number	<input type="radio"/> Yes <input checked="" type="radio"/> No <input type="radio"/> Not sure
*Question 7 Was the invention made in the course of any alliance, joint development or other contract activities? If Yes, enter the following: Name of Alliance, Contractor or Joint Developer Contract ID number Relationship contact name Relationship contact e-mail Relationship contact phone	<input type="radio"/> Yes <input checked="" type="radio"/> No <input type="radio"/> Not Sure
Question 8 Have you submitted, or are you aware of, any related disclosure submission? If Yes, please provide the title and docket or disclosure number below:	<input type="radio"/> Yes <input checked="" type="radio"/> No

Travel agent system to automatically handle company mail and package delivery instructions. - continued

31

**Question 9**

What type of companies do you expect to compete with inventions of this type? Check all that apply.

- ☐ Manufacturers of enterprise servers
- ☐ Manufacturers of entry servers
- ☐ Manufacturers of workstations
- ☐ Manufacturers of PC's
- ☐ Non-computer manufacturers
- ☐ Developers of operating systems
- ☐ Developers of networking software
- ☐ Developers of application software
- ☐ Integrated solution providers
- ☐ Service providers
- ☐ Other (Please specify below)

Travel Agents/Agencies

**Patent Value Tool (Optional - this may be used by the inventor and attorney to assist with the evaluation)**

(The Patent Value tool can be used by you or the evaluation team to determine the potential licensing value of your invention.)


The Patent Value Tool has not yet been used to calculate a score.

**Post Disclosure Text & Drawings**

Enter any additional information relating to this disclosure below:

(Form Revised [REDACTED])

21

	<b>Disclosure AUS8-2000-0226</b>
	Created By: Clifford Spinac Created On: [REDACTED] 04:35:02 PM
	Last Modified By: Herman Rodriguez Last Modified On: [REDACTED] 10:01:38 AM
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Required fields are marked with the asterisk (\*) and must be filled in to complete the form.

**Summary**

Status	Under Evaluation
Processing Location	AUS
Functional Area	67 - NCS - OPERATING SYSTEMS DEV (L. Santivenero)
Attorney/Patent Professional	David Mims/Austin/IBM
IDT Team	Chrystal Windham/Austin/Contr/IBM
Submitted Date	[REDACTED] 05:39:46 PM
Owning Division	NCS
PVT Score	To calculate a PVT score, use the 'Calculate PVT' button.
Incentive Program	
Lab	
Technology Code	

**Inventors with Lotus Notes IDs**

Inventors: James Smith/Austin/IBM, Clifford Spinac/Austin/IBM, Herman Rodriguez/Austin/IBM

Inventor Name > denotes primary contact	Inventor Serial	Div/Dept	Manager Serial	Manager Name
> Smith, N.J. (James)	184864	7372BCA	280476	Stoetzel, Yvonne P.
Spinac, C.J. (Clifford)	583042	7NWXGSA	524993	Roberts, J.H. (Irene)
Rodriguez, H. (Herman)	378888	7T7ZDAA	D38520	St. Pierre, Ron

**Inventors without Lotus Notes IDs****IDT Selection**

IDT Team: Chrystal Windham/Austin/Contr/IBM	Attorney/Patent Professional: David Mims/Austin/IBM
--	--

Response Due to IP&L : [REDACTED]
-----------------------------------

**Main Idea****\*Title of disclosure (in English)**

Travel agent system to automatically update telephone answering system

**\*Idea of disclosure**

1. Describe your invention, stating the problem solved (if appropriate), and indicating the advantages of using the invention.

After a user calls a travel agent to make travel arrangements, the user before starting his travel must take several steps in order setup/configure his telephone answering system. This setup/configuration can consist of several settings including a response message for being away, a forwarding number to receive calls, and a paging number to alert the user to new messages and caller-id numbers from callers. When



Travel agent system to automatically update telephone answering system - continued

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the traveler returns, he must re-establish the settings for his answering system to those he uses while he is at home. In addition, any changes to his itinerary may require the user to revise his telephone settings.

This invention solves these problems by creating a method by which the above steps are automated, and are initiated as a result of the user making his travel arrangements.

The setup/configuration changes of the user's telephone system are handled automatically based on the user's profile and travel itinerary.

The traveler does not need to manually change or revise his telephone system settings.

2. How does the invention solve the problem or achieve an advantage, (a description of "the invention", including figures inline as appropriate)?

The method created by this invention is as follows:

1. The user's profile at the travel agent will now include a preference option to automatically generate and send mail to the user, containing a "travel plan" as an attachment. This travel plan contains the travel itinerary that specifies the date and time the user is scheduled to be away.
2. The user's telephone answering system registers itself with the user's mail program (e.g. Netscape Mail, Yahoo mail, Outlook, etc.) such that when a "travel plan" is detached and accepted, the telephone answering system is notified of the travel plan.
3. The telephone answering system uses that travel plan as an indication that the user is planning to travel. As a result, this travel plan is used to activate a "traveling environment" in the telephone answering system.
4. When the user detaches and opens the "travel plan" in the mail attachment, the user is asked whether or not to accept the travel plan.
5. If the travel plan is accepted, then the telephone answering system is notified of the travel plan.
6. When the telephone answering system is notified of the travel plan, the configuration/settings for the answering system are set to the "travel environment" as per the plan. This includes activating the traveling environment when the user departs, and restoring the normal environment when the user is scheduled to return.
7. If any changes in travel plans occur while the user is away, the travel agent sends updated travel plans to the user.
8. The user has the option to specify whether updated travel plans need to be confirmed or not. If the updated plan needs to be confirmed, the mail attachment must be opened and accepted, and then forwarded to the telephone answering system. If no confirmation is required, the updated travel plan is automatically sent to the telephone answering system.
9. The updated "travel plan" is used to reprogram the telephone answering system.
10. One possible embodiment of the interface and registration between the mail handler and the telephone answering system could be via a secure https interface.

3. If the same advantage or problem has been identified by others (inside/outside IBM), how have those others solved it and does your solution differ and why is it better?

The user must manually change his telephone answering system to match his travel plans.

4. If the invention is implemented in a product or prototype, include technical details, purpose, disclosure details to others and the date of that implementation.

NA

**\*Critical Questions ( Questions 1 - 7 must be answered)**

Travel agent system to automatically update telephone answering system - continued

31

**\*Question 1**

On what date was the invention workable? **Please format the date as MM/DD/YYYY**  
(Workable means i.e. when you know that your design will solve the problem)

**\*Question 2**

Is there any planned or actual publication or disclosure of your invention to anyone outside IBM?

☐ Yes☒ No

If yes, Enter the name of each publication or patent and the date published below.

Publication/Patent:

Date Published or Issued:

Are you aware of any publications, products or patents that relate to this invention?

☐ Yes☒ No

If yes, Enter the name of each publication or patent and the date published below.

Publication/Patent:

Date Published or Issued:

**\*Question 3**

Has the subject matter of the invention or a product incorporating the invention been sold, used internally in manufacturing, announced for sale, or included in a proposal?

☐ Yes☒ No

Is a sale, use in manufacturing, product announcement, or proposal planned?

☐ Yes☒ No

If Yes, identify the product if known and indicate the date or planned date of sale, announcements, or proposal and to whom the sale, announcement or proposal has been or will be made.

Product:

Version/Release:

Code Name:

Date:

To Whom:

If more than one, use cut and paste and append as necessary in the field provided.

**\*Question 4**

Was the subject matter of your invention or a product incorporating your invention used in public, e.g., outside IBM or in the presence of non-IBMers?

☐ Yes☒ No

If yes, give a date. **Please format the date as MM/DD/YYYY**

**\*Question 5**

Have you ever discussed your invention with others not employed at IBM?

☐ Yes☒ No

If yes, identify individuals and date discussed. Fill in the text area with the following information, the names of the individuals, the employer, date discussed, under CDA, and CDA #.

**\*Question 6**

Was the invention, in any way, started or developed under a government contract or project?

☐ Yes☒ No☐ Not sure

If Yes, enter the contract number.

**\*Question 7**

Was the invention made in the course of any alliance, joint development or other contract activities?

☐ Yes☒ No☐ Not Sure

If Yes, enter the following: Name of Alliance, Contractor or Joint Developer

Travel agent system to automatically update telephone answering system - continued

31

Contract ID number
Relationship contact name
Relationship contact E-mail
Relationship contact phone

**Question 8**

Have you submitted, or are you aware of, any related disclosure submission?

☐ Yes☒ No

If Yes, please provide the title and docket or disclosure number below:

**Question 9**

What type of companies do you expect to compete with inventions of this type? Check all that apply.

- ☐ Manufacturers of enterprise servers
- ☐ Manufacturers of entry servers
- ☐ Manufacturers of workstations
- ☐ Manufacturers of PC's
- ☐ Non-computer manufacturers
- ☐ Developers of operating systems
- ☐ Developers of networking software
- ☐ Developers of application software
- ☒ Integrated solution providers
- ☐ Service providers
- ☐ Other (Please specify below)

Telephone Answering Systems, Telephone PBX Systems, Travel Agents

**Patent Value Tool (Optional - this may be used by the inventor and attorney to assist with the evaluation)**

(The Patent Value tool can be used by you or the evaluation team to determine the potential licensing value of your invention.)

The Patent Value Tool has not yet been used to calculate a score.

**Post Disclosure Text & Drawings**

Enter any additional information relating to this disclosure below:

(Form Revised 1/01)



## Disclosure AUS8-2000-0250

Created By: James Smith Created On: [REDACTED] 03:38:21 PM  
 Last Modified By: Enterprise Services Last Modified On: [REDACTED] 12:05:14 AM

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Required fields are marked with the asterisk (\*) and must be filled in to complete the form.

### Summary

Status	Sent for Search/Awaiting Results
Processing Location	AUS
Functional Area	57 - NCS - OPERATING SYSTEMS DEV (L. Santivenere)
Attorney/Patent Professional	David Mims/Austin/IBM
IDT Team	Chrystal Windham/Austin/Contr/IBM; leb
Submitted Date	[REDACTED] 05:33:52 PM
Owning Division	NCS
PVT Score	To calculate a PVT score, use the 'Calculate PVT' button.
Incentive Program	
Lab	
Technology Code	

### Inventors with Lotus Notes IDs

Inventors: James Smith/Austin/IBM, Herman Rodriguez/Austin/IBM, Clifford Spinac/Austin/IBM

Inventor Name > denotes primary contact	Inventor Serial	Div/Dept	Manager Serial	Manager Name
> Smith, N.J. (James)	184864	7J/2BCA	280476	Stoetzel, Yvonne P.
Rodriguez, H. (Herman)	378888	7T/ZQAA	038320	St. Pierre, Ron
Spinac, C.J. (Clifford)	583042	7N/WXHA	624003	Roberts, L.H. (Lrene)

### Inventors without Lotus Notes IDs

#### IDT Selection

##### Main Idea

#### \*Title of disclosure (In English)

Travel agent system to automatically provide HMO/Medical Provider information to traveler

#### \*Idea of disclosure

To view the main idea for this disclosure, click on this doclink --->

#### \*Critical Questions ( Questions 1 - 7 must be answered)

Patent Value Tool (Optional - this may be used by the Inventor and attorney to assist with the eval  
 Evaluation

#### Search Information

Date sent: [REDACTED]	Target completion date: [REDACTED]	Actual completion date:
Who was the search sent to (This area is to designate a Local Searcher name or WAIPLY)		
Send search request to:	Search Type:	

11:02 FR IBM AUSTIN IPLAW

512 823 1036 TO 93016742

P.02/05

Main idea for disclosure AUS8-2000-0250 - continued

**Main Idea for Disclosure AUS8-2000-0250**

Archived On: 12:05:13 AM

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**Title of disclosure (in English)**

Travel agent system to automatically provide HMO/Medical Provider Information to traveler

**Idea of disclosure**

1. Describe your invention, stating the problem solved (if appropriate), and indicating the advantages of using the invention.  
After a user calls a travel agent to make travel arrangements, the user must manually determine the names and locations of facilities which can provide medical assistance - usually under stressful or emergency conditions. The facilities found under these circumstances may not be a part of the traveler's HMO/Medical Plan, so that, at best the charges may not be reimbursed, or at worst, treatment may be denied.

This invention solves that problem by creating a method to automatically generate information on the medical facilities at the traveler's destination which are part of the traveler's HMO/Medical Plan and are in the general area where the traveler will be visiting. This information is downloadable as provided by the travel agency. If there is a change in travel plans, the appropriate information for the new destination is communicated to the traveler via e-mail, FAX, wireless phone/PDA, or other means by which the traveler can be contacted..


2. How does the invention solve the problem or achieve an advantage, (a description of "the invention", including figures inline as appropriate)?

The method created by this invention is as follows:

1. The user's profile at the travel agent will now include a preference option which describes his HMO/Medical Insurance plan, medical conditions, allergies, necessary medical supplies (e.g., insulin), etc.
2. When the travel agent makes travel arrangements on behalf of the user, the medical preferences are used to search for physicians, hospitals, pharmacies, etc., from a medical database which provides information about needed services which are a part of the traveler's HMO/Medical Plan.
3. For each medical provider specific information is included about services available, as well as address, telephone number, hours of operation, driving directions, GPS Way Points, etc.
4. This information is included in the travel package which is sent to the traveler by the travel agency, as electronic documents downloadable to the traveler's computer or PDA, etc. If the traveler is not electronically connected, then the information is faxed or mailed as appropriate.
5. If travel plans change, the travel agency sends updated information to the appropriate destination. For example, an electronic update could be sent to the user's mobile phone messaging system.

3. If the same advantage or problem has been identified by others (inside/outside IBM), how have those others solved it and does your solution differ and why is it better?  
Not previously solved. Traveler has to find this information manually.

4. If the invention is implemented in a product or prototype, include technical details, purpose, disclosure details to others and the date of that implementation.

	<b>Disclosure AUS8-2000-0251</b>
	Created By: Clifford Spinac Created On: [REDACTED] 06:57:16 PM Last Modified By: Herman Rodriguez Last Modified On: [REDACTED] 05:11:50 PM
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Required fields are marked with the asterisk (\*) and must be filled in to complete the form.

### Summary

Status	Submitted
Processing Location	AUS
Functional Area	67 - NCS - OPERATING SYSTEMS DEV (L. Santivenere)
Attorney/Patent Professional	David Mims/Austin/IBM
IDT Team	Chrystal Windham/Austin/Contr/IBM
Submitted Date	[REDACTED] 05:10:51 PM
Owning Division	NCS
PVT Score	To calculate a PVT score, use the 'Calculate PVT' button.
Incentive Program	
Lab	
Technology Code	

### Inventors with Lotus Notes IDs

Inventors: James Smith/Austin/IBM, Clifford Spinac/Austin/IBM, Herman Rodriguez/Austin/IBM

Inventor Name > denotes primary contact	Inventor Serial	Div/Dept	Manager Serial	Manager Name
> Smith, N.J. (James)	184864	7J2BCA	280476	St Gerzai, Yvonne P.
Spinac, C.J. (Clifford)	583042	7NWXHA	524093	Roberts, J.H. (Irene)
Rodriguez, H. (Herman)	378888	7TZQAA	038320	St Pierre, Ron

### Inventors without Lotus Notes IDs

#### IDT Selection

IDT Team: Chrystal Windham/Austin/Contr/IBM	Attorney/Patent Professional: David Mims/Austin/IBM
--	--

### Main Idea

#### \*Title of disclosure (In English)

Travel agent system to automatically send points of interest, including directional information, to traveler

#### \*Idea of disclosure

1. Describe your invention, stating the problem solved (if appropriate), and indicating the advantages of using the invention.

After a user calls a travel agent to make travel arrangements, the user must take several steps in order to find locations of points of interest, meetings/work, hotels, businesses, and restaurants, which are located at the destinations of his travel itinerary. In addition, the user must often lookup driving directions, and possibly map out the directions to these locations. Often the work involved with these tasks involve searching the web or using travel programs for finding the desired location information and driving instructions.

This invention solves this problem by creating a method by which locations of interest, including their descriptions, GPS way-points, directional landmarks, and driving instructions between major locations (such as airport and hotel) are automatically created. These are sent to the user as a result of the user making travel arrangements. The user can then download this location information to load it into his notebook computer, portable computing device, or PDA, so that the information can be used as a reference while he is traveling. The user can also download the information for printing as hard copy carry along information. In addition, the GPS way-point information can be used to provide real time directional information while traveling to one of these location points by use of a portable GPS travel system (such as Delorme Earthmate with a notebook computer or Palm PDA). The travel information can also be sent directly to the user's mobile phone, or could be sent to the user's fax machine for hard-copy.

2. How does the invention solve the problem or achieve an advantage, (a description of "the invention", including figures inline as appropriate)?

The method created by this invention is as follows;

1. The user's profile at the travel agent will now include a preference option to automatically generate and send mail to the user which will include a "travel package" as an attachment. This travel package contains the travel information which is relevant to the traveler's trip itinerary. The travel information will include the location information, as specified by the user's profile. The travel agent can use various web travel services to retrieve this information, and could form an alliance with a travel service bureau to help advertise that service (e.g. "Travel and Map Information provided As a Service by Yahoo Travel").
2. The user can receive the travel package in his email, directly to his mobile phone, or to a fax machine as appropriate.
3. Text and summary location information can be printed by the user to carry as hard copy for his trip
4. The package is loaded into the user's notebook computer, portable computer, or PDA, for future reference while traveling.
5. The GPS way-points are loaded into the user's GPS or GPS computing device, for real-time directional information while the user is traveling within the city of one of his destinations.
6. If any changes in travel plans occur while the user is away, the travel agent sends an updated travel package to the user.
7. The updated travel package can be received by the user while traveling.

3. If the same advantage or problem has been identified by others (inside/outside IBM), how have those others solved it and does your solution differ and why is it better?  
Not previously solved.

4. If the invention is implemented in a product or prototype, include technical details, purpose, disclosure details to others and the date of that implementation.  
NA

**\*Critical Questions ( Questions 1 - 7 must be answered)**

**\*Question 1**

On what date was the invention workable? **██████████** Please format the date as MM/DD/YYYY  
(Workable means i.e. when you know that your design will solve the problem)

Travel agent system to automatically send points of interest, including directional information, to [redacted] - continued

31

<b>*Question 2</b> Is there any planned or actual publication or disclosure of your invention to anyone outside IBM?		<input type="radio"/> Yes <input checked="" type="radio"/> No
If yes, Enter the name of each publication or patent and the date published below.		
Publication/Patent: Date Published or Issued:		
Are you aware of any publications, products or patents that relate to this invention?		<input type="radio"/> Yes <input checked="" type="radio"/> No
If yes, Enter the name of each publication or patent and the date published below.		
Publication/Patent: Date Published or Issued:		
<b>*Question 3</b> Has the subject matter of the invention or a product incorporating the invention been sold, used internally in manufacturing, announced for sale, or included in a proposal?		<input type="radio"/> Yes <input checked="" type="radio"/> No
Is a sale, use in manufacturing, product announcement or proposal planned?		<input type="radio"/> Yes <input checked="" type="radio"/> No
If Yes, identify the product (if known) and indicate the date of planned date of sale, announcements, or proposal and to whom the sale, announcement or proposal has been or will be made.		
Product: Version/Release: Code Name: Date: To Whom:		
If more than one, use cut and paste and append as necessary in the field provided.		
<b>*Question 4</b> Was the subject matter of your invention or a product incorporating your invention used in public, e.g., outside IBM or in the presence of non-IBMers?		<input type="radio"/> Yes <input checked="" type="radio"/> No
If yes, give a date. Please format the date as MM/DD/YYYY.		
<b>*Question 5</b> Have you ever discussed your invention with others not employed at IBM?		<input type="radio"/> Yes <input checked="" type="radio"/> No
If yes, identify individuals and date discussed. Fill in the text area with the following information, the names of the individuals, the employer, date discussed, under CDA and CDA #.		
<b>*Question 6</b> Was the invention, in any way, started or developed under a government contract or project?		<input type="radio"/> Yes <input checked="" type="radio"/> No <input type="radio"/> Not sure
If Yes, enter the contract number.		
<b>*Question 7</b> Was the invention made in the course of any alliance, joint development or other contract activities?		<input type="radio"/> Yes <input checked="" type="radio"/> No <input type="radio"/> Not Sure
If Yes, enter the following: Name of Alliance, Contractor or Joint Developer		
Contract ID number		
Relationship contact name		
Relationship contact E-mail		
Relationship contact phone		

Printed [redacted] at 07:45:39 AM



**Question 8**

Have you submitted, or are you aware of, any related disclosure submission?

☐ Yes  
☒ No

If Yes, please provide the title and docket or disclosure number below:

**Question 9**

What type of companies do you expect to compete with inventions of this type? Check all that apply.

- ☐ Manufacturers of enterprise servers
- ☐ Manufacturers of entry servers
- ☐ Manufacturers of workstations
- ☐ Manufacturers of PC's
- ☐ Non-computer manufacturers
- ☐ Developers of operating systems
- ☐ Developers of networking software
- ☐ Developers of application software
- ☐ Integrated solution providers
- ☐ Service providers
- ☐ Other (Please specify below)

Travel Agents, GPS System makers, Mapping Software developers

**Patent Value Tool (Optional - this may be used by the inventor and attorney to assist with the evaluation)**

(The Patent Value tool can be used by you or the evaluation team to determine the potential licensing value of your invention.)

The Patent Value Tool has not yet been used to calculate a score.

**Post Disclosure Text & Drawings**

Enter any additional information relating to this disclosure below:

(Form Revised [REDACTED])

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